

**TORONTO  
ASSOCIATION OF LAW  
LIBRARIES (TALL)**

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## **Submission to the TALL Quarterly**

We welcome contributions to the TALL Quarterly in the form of an article, opinion piece or a theme for a forthcoming issue. Upcoming themes include:

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# Quarterly Topic Introduction: Knowledge Management

*TALL Blog Editors*

Each quarter, the TALL Blog will focus in on a certain topic relevant to our legal information landscape. Throughout the quarter, our goal will be to add to your understanding of a certain concept, practice, or field of legal information. Fear not, some topical posts will stray from the topic, keeping you well informed and up to date on what is happening in our community.

This quarter, the TALL Blog is focusing on Knowledge Management. Inspired by our recent survey results that indicated a number of people in our community are interested in learning more about this topic and its impact on the world of legal librarianship. From feature articles from prominent knowledge management professionals, to profiles of TALL members working in the knowledge management field, this quarter will be packed with lots of inside scoops on the state of knowledge management in our community. Stay tuned over the next few months to read more!

# Learning from Feedback: Teaching Future Lawyers

*Joan Rataic-Lang, Library Director, and  
Erin Wescott, Library Manager, Toronto Lawyers Association*

*For the past 8 years, the Toronto Lawyers Association has presented its Head Start educational program for articling students and licensing candidates. Having recently completed another successful session of practical advice and community-building, TLA Library Director Joan Rataic-Lang and Library Manager Erin Wescott shared their thoughts on teaching future lawyers. LexisNexis Canada is a proud supporter of the TLA and the Head Start program.*

As summer fades into fall, we at the TLA turn our focus toward teaching future lawyers. Each September we offer a series of programs tailored specifically to articling students: Masters Motions, Head Start, and Writing a Legal Memo. Our goal is to give them the relevant, practical information they need at the beginning of their articles, under the guidance of masters and senior lawyers.

Volumes have been written on the subject of dealing with Millennials and Generation Z, with the unfortunate emphasis on “dealing with.” That condescending approach goes against the principles of adult learning, one of which is that adult learners want to be respected as such. Articling students are coming to us at the end of their law school curriculum, often with an earlier degree already in hand. They’re not uneducated, just new to the profession.

This is clear in the feedback that we receive. They don’t want to be talked down to. They don’t want to have a lot of filler thrown at them, they want practical answers to the questions they have about working in the profession. They want to know where to go, what to do, and they enjoy hearing about the learning experiences of others as long as they can be applied broadly. They will not tolerate out-dated attitudes and jokes in this area will offend. A little fun and humour is okay, however as adult learners they want the focus to be on the goal. Their goal is to succeed at their year of articling and launch their legal career. Anything cutesy that distracts from that isn’t relevant to them.

Every year we take what we’ve heard and apply it to improve the programs for the following year. An important takeaway from this year was about how we frame the discussion about appropriate court attire. We get a lot of feedback from judiciary of all genders about the apparel that articling students are wearing into the courtroom, so we do think there is value in talking about it. In particular, we try to emphasize the importance of dressing to match the level of professionalism their principals are held to in the courtroom. However, anything that puts the focus on the behaviour of one gender versus others should be avoided and that’s something we want to be conscious of moving forward.

One aspect of our programs never changes, our commitment to providing articling students with the resources they need to successfully navigate their last challenge before being called to the bar.

# The ISO 30401 Standard on Knowledge Management Systems - Requirements

*Jennifer McNenly, Director, Knowledge Services, Fasken*

The purpose of this new standard is to define the requirements for knowledge management (KM) systems and to support organizations to develop management systems that effectively promote and enable value creation through knowledge. Competency is key in optimizing value of organizational knowledge. The standard forms the basis for auditing, certifying, evaluating and recognizing competent organizations by internal and external auditing bodies.

Knowledge is intangible and complex. It is created by people. It serves organizational objectives, strategies and needs. KM should include interactions between people, processes and technologies, where appropriate, and focus on managing not knowledge directly, but rather the working environment, thus nurturing the knowledge lifecycle. Culture is critical to the effectiveness of KM. It should be adaptable and iterative, incorporating learning and feedback cycles.

ISO 30401 provides terms and definitions. It emphasizes understanding the context of the organization. It defines the following as parts of any KM system:

- Knowledge development - acquiring new knowledge, applying current knowledge, retaining current knowledge, handling outdated and invalid knowledge
- Knowledge conveyance and transformation - human interactions, representation (demo, document, codify), combination (curation, classification)
- Knowledge management enablers - human capital (cto, km lawyers, etc...), processes, technology/infrastructure, governance, culture

Leadership and commitment must be integral. This way policy and intended objectives are established and reviewed. Integration into the business and project processes is ensured and management of the process of change is driven towards adoption and application. Leadership also provides motivation, inspiration and empowerment for people to contribute and share knowledge as it applies to their roles and areas of responsibility. Continuous improvement occurs when leadership and commitment is present.

Having a KM policy that is appropriate to the purpose of the organization and provides a framework and guiding principles is critical. It signals a commitment to satisfy applicable regulatory and other requirements and is communicated, understood and applied within the organization. Roles, responsibilities and authorities ensures engagement of people, conformity to the standard and reporting to top management. Planning and operations should address risk and opportunities, criteria and control of processes. Specific KM

objectives should be spelled out with a plan to achieve them. What will be done and by whom; who will be accountable; what resources will be required; who will be responsible; when it will be completed; how the results will be evaluated are all questions you should be asking and answering. Support should define the resources (technology, people, funding, management commitment) and the competency of people (creators, users, designers, etc.) in various roles.

Other areas highlighted in the standard include communications (what, when, with whom and how to deliver communications relevant to KM), control of documented information (distribution, retrieval, use, storage, preservation, version control, disposal), monitoring (measurement, analysis and evaluation / internal audits / management reviews), and continual improvement and corrective actions.

There is a final word on what constitutes a healthy KM culture. People who feel comfortable openly discussing issues and offering advice. Sharing, feeling empowered to act, self-directed learning and collaboration are also mentioned. Key values and factors include leadership, trust, engagement, diversity, policies, training and competence.

## **Save the date for the 3<sup>rd</sup> TALL eXchange Conference – Oct. 22<sup>nd</sup>, 2020!**

*TALL Blog Editors*

We are excited to announce that TALL will hold the 3rd eXchange Conference on Thursday, October 22nd, 2020 at the MaRS Discovery Centre.

For information on how to participate, sponsor, register and more, please check out the conference website: [www.tallexchange.weebly.com](http://www.tallexchange.weebly.com)

#TALL2020



## Report on ILTA's Legal AI Efficacy for Corporate and Law Firms Panel Session

*Cecilia Rose, Legal Technology Applications Specialist, Stikeman Elliott LLP*

On September 20, 2019 I had the pleasure of attending a roundtable session on legal artificial intelligence held by the International Legal Technology Association (ILTA) at the offices of Blake, Cassels & Graydon in Toronto. The panel was made up of Dera Nevin, Adjunct Professor at the University of Toronto Faculty of Law; Ivo Nikolov, Director IT at Davies Ward Phillips & Vineberg; and Nikki Shaver, Director, Innovation and Knowledge at Paul Hastings. The session covered issues with artificial intelligence platforms developed for the legal industry, what has been learned so far in this area of technology, and the newly released Legal AI Efficacy Report, an analysis of 48 AI-powered legal technology tools.

The discussion focused on practical tips on how to approach legal AI within your firm. Everything from developing AI strategies (don't put the cart before the horse, the business problem needs to come first) to planning and organizing a legal AI project (know your data and run projects in parallel) to watching for pitfalls (need strong information governance and supervision) to a humbling conclusion that our AI is not the big ugly monster (or robot?) that Stanley Kubrick predicted in 2001: A Space Odyssey. Our AI is "weak" AI, and it is in no way stealing anyone's job, at least for now. It is a tool, to be used to "augment" and "enhance" and generally make more efficient, the routine tasks that bog legal staff down daily, so that they have time to focus on more complex and important legal work. AI also happens to be a buzzword, and, as Ivo Nikolov pointed out, 20 years ago we would have just been discussing "software" rather than "AI-powered software".

The biggest takeaway, something that those of us currently working with legal technology probably already know, is that the software is generally not "out of the box". It requires extensive training and supervision. You cannot snap a finger and get immediate, perfect results. There is still a lot of knowledge work that needs to be invested. Not to mention adapting the technology for Canadian law, as so often the platforms are developed and trained elsewhere. So, if you are considering embarking on a legal AI project, or talking to vendors about their sparkly new legal AI software, remember:

1. Any AI product is going to take approx. 30-60 "examples" to be properly trained
2. It will always take double the training time so think about resources
3. The training is going to have to be maintained on an ongoing basis, again, resources
4. Assemble a team of patient, tech-savvy, linguistic-oriented people

5. Normalize your data structure, naming conventions, date formats, etc.
6. Qualitative bias inherent in your data will influence the training and accelerate and amplify a trend you may or may not want – so make sure it's consistent and neutral
7. Always set requirements and metrics in advance to measure success, otherwise how do you know it's working?
8. Do not run old projects to “test” the AI, you could run into ethical issues if it finds something new
9. Lawyers need to trust the technology but will require a deep understanding of how it operates
10. It's not just about performance of the product, it's about performance of humans

Lastly, when considering buying legal AI technology, ask the hard questions. The vendors will give you their pitch and present a pretty picture of the best-case scenario in the demo, but it's your job to make sure the product will solve your particular business problem. Ask about security: look at their website for white papers. Ask about the data: where does it reside and who sees it? Ask about the algorithm: who trained it and where? Ask about the technology: what does it use? Is it the right tool for the job? And finally remember that all the usual rules of buying technology apply.

# Joint Season Social Roundup 2019: Get to know your fellow special library organizations!

*TALL Blog Editors*

This year we are happy to share our season social festivities with our colleagues in fellow special library organizations in and around Toronto! But how much do you know about them and what they get up to? We asked reps from each organization to tell us a little bit about their respective association in advance of our Joint Season Social on Dec. 5<sup>th</sup>, 2019.

## **[Toronto Association of Law Libraries \(TALL\)](#)**

Since its inception in 1979, TALL's aim has remained the same: to provide the legal information professional with a network to exchange ideas and promote professional development. Our members cover the gamut of the legal community, ranging from law firm, academic, government, legislative, law society, court house and corporate libraries as well as several legal publishers. TALL connects its membership through educational programming, social events, a quarterly newsletter, a listserv, a Membership List and an Organization Directory.

## **[Special Libraries Association Toronto \(SLA Toronto\)](#)**

SLA Toronto was founded in 1940 and represents the interests of information professionals in Toronto and most of the province of Ontario, west of Kingston. The Toronto Chapter is a dynamic and active chapter of [Special Libraries Association \(SLA\)](#), an international organization headquartered in Alexandria, Virginia. We provide an opportunity for information professionals in our area to learn and network at events, as well as participate in the community via our social media.

## **[Toronto Health Libraries Association \(THLA\)](#)**

The Toronto Health Libraries Association (THLA) was originally established as the Toronto Medical Libraries Group during the fall of 1965 to meet occasionally and informally in order to discuss matters of mutual interest. THLA is a professional organization of members from medical and allied health libraries in the Toronto area. As a chapter of the Canadian Health Libraries Association/Association des bibliothèques de la santé du Canada (CHLA/ABSC), THLA is dedicated to the improvement of health and health care through the promotion of excellence in access to information.

## **[Ontario Library Association Special Libraries Committee \(OLA-SLC\)](#)**

The OLA Special Libraries Committee (OLA-SLC) is a group of special librarians and non-traditional information professionals dedicated to collaborating, promoting, and sharing the wealth of knowledge in our professional community in Ontario. Members come from a diverse range of fields including librarians in government, law, business and news, as well as research consultants, information specialists, knowledge workers, prospect researchers, and students. The committee hosts professional development

events, article nights, community socials, and provides opportunities for partnerships and community outreach.

### **Faculty of Information Alumni Association (FIAA)**

The Faculty of Information Alumni Association (FIAA) is an organization made up of the nearly 7,000 graduates of the Faculty of Information and its predecessors. Upon convocating, each graduate automatically becomes a member of FIAA, and is welcome to attend any alumni event, serve on FIAA's executive, volunteer, or participate as a member-at-large. We are a vibrant community, with a mandate is to represent alumni interests.

### **Association of Professional Researchers for Advancement (Apra Canada)**

Apra Canada will be a leader and strategic partner in philanthropy, contributing to the success of its Canadian members, the nonprofit community and other constituents. As a premier organization for fundraising research, analytics and relationship management, Apra Canada's mission is to promote the value and impact of its members. Apra Canada is a chapter of Apra International and is a registered society in the Province of British Columbia. Apra Canada Membership is open to Canadian researchers, front-line fundraisers and others with an interest in the field of advancement research.

### **What is your favourite part of being a member of your organization?**

**SLA Toronto – Rita Egede, SLA Toronto Director, Programming:** I love the learning opportunities that the association provides. This year, I took up the role as programming director, and I am now a better and resourceful event planner. I have learnt new event tools, expanded my network and improved my leadership capabilities.

**THLA - Naz Torabi, THLA President-Elect:** THLA connects all health/medical librarians around Toronto. We have approximately 80 members and it is a great way to network and to get connected with other professionals in GTA.

**OLA-SLC - Maggie Tiong, OLA-SLC Committee Member:** I have met so many fascinating professionals from diverse backgrounds.

**TALL - Julie Hetherington-Field, TALL President:** The people! When I first arrived in Canada 14 years ago, TALL members took me under their wing and taught me what I needed to know to be able to get a job here. The members of TALL may have changed a little over the years but that same sense of community and collegiality remains.

### **What was your favourite event held by your organization last year and why?**

**FIAA – Sooin Kim, FIAA President:** At the Canadian Association of Law Libraries Conference in May, Eve Leung and I hosted a fun "Meet-Up in Edmonton" alumni reunion. Faculty of Information Alumni from all across the country got together to mix, mingle, and catch up over delicious appetizers and drinks at Revel, a lively local bistro.

**SLA Toronto – Rita Egede, SLA Toronto Director, Programming:** The Joint Holiday Social was my favourite event held last year. It was an event that brought together members of five (5) library associations in the Toronto region. It provided members the opportunity to be appreciated through awards and gifts, have fun and to connect with special library professionals in the community.

**THLA - Naz Torabi, THLA President-Elect:** I have been very impressed with the types of events that THLA has organized in the past. They always have the best speakers about very interesting and timely topics. For example, 6 months ago, I attended a lecture about the use of graphic medicine for patient care by Shelley Wall who is an assistant professor in the Biomedical Communications Graduate Program at the University of Toronto. It was an inspirational talk and very informative. I would be very happy to talk about this topic with anyone at our joint holiday social.

**OLA-SLC - Maggie Tiong, OLA-SLC Committee Member:** We held a tour of Snakes and Lattes board game café and learned about how the games are classified. It was fascinating and then afterwards we played a few games.

**TALL - Julie Hetherington-Field, TALL President:** The Securities lunchtime session arranged by our Education Committee. The lunch and learn was well-organized and appreciated by the attendees. Close runners-up are the Tax lunch and learn (a maze of information that we have to find our way through at times) and the establishment by the Social Committee of the coffee roulette program, which has introduced me to new people and reminded me to catch up with friends.

#### **What does your organization do really well?**

**SLA Toronto – Rita Egede, SLA Toronto Director, Programming:** I would say Professional Development Programs (in-person trainings, webinars, and networking events).

**OLA-SLC - Maggie Tiong, OLA-SLC Committee Member:** We are inclusive of information professionals in a wide variety of professional situations.

**TALL - Julie Hetherington-Field, TALL President:** TALL fosters a sense of community and cooperation among its members, even though many of our employers are direct competitors. We understand how to protect the confidentiality of our workplaces while helping each other when we can.

#### **What are you looking forward to doing next year as a member of the organization?**

**FIAA – Sooin Kim, FIAA President:** The FIAA Executive is thrilled to welcome so many bright and talented recent graduates to our team for the 2019-2020 term. Each of our FIAA committees is strong; we have energetic and engaged student representatives; and a wonderful Alumni Development Officer. We are all looking forward to working together to continue to best serve the interest of our vibrant, 7,000-strong Alumni.

**THLA - Naz Torabi, THLA President-Elect:** Recently, we have started to digitize our paper archives. Some of our historical newsletters go back to 1982. We are finding a lot of gems and digitizing them will be a great way to better preserve them and make them accessible. I can't wait until we have everything digitized and open to the public.

**OLA-SLC - Maggie Tiong, OLA-SLC Committee Member:** I am looking forward to preparations for the OLA Superconference.

**TALL - Julie Hetherington-Field, TALL President:** The TALL eXchange conference in October 2020! As we all look to the future of our profession, I have high hopes the conference will give some great ideas and reassurances.

**What is a fun fact about your organization?**

**FIAA – Sooin Kim, FIAA President:** On June 12, 2019, the Team FIAA were Champions of Trivia Night at the Fortunate Fox. We are fairly certain that our victory inspired the Toronto Raptors to clinch the NBA Championship the very next night.

## Final Thoughts

**Interested in contributing to the TALL Quarterly Newsletter? Have questions or concerns about the content you've seen here?**

**Feel free to contact us anytime! Email us at [tall.blog.2019@gmail.com](mailto:tall.blog.2019@gmail.com)**

**COMING UP NEXT QUARTER:  
TEACHING & TRAINING**